TEA BOARD OF KENYA

Realizing the Tea Promise

KENYA TEA INDUSTRY PERFORMANCE HIGHLIGHTS FOR FEBRUARY 2025

PRODUCTION

Tea production for the month of February 2025 was lower by 10.83 Million Kgs (13.49%) from 55.44 Million Kgs recorded during the same period of 2024 to 44.61 Million Kgs. It was also lower compared to 54.36 Million Kgs recorded in the month of January this year. Drop in production was occasioned by hot and dry weather conditions experienced throughout the month with the exception of isolated areas over the Highlands West of the Rift Valley, Central and Highlands East of the Rift Valley which recorded minimal rainfall. Though February is usually the hottest month of the year, last year it was characterized by good weather conditions occasioned by *El-nino* phenomenon resulting in high tea production.

The effect of dry weather on tea production during the month of February this year was pronounced in both the East of Rift and West of Rift, consequent to which the tea output dropped by 21.23% in the East of Rift from 19.57 Million Kgs recorded in the month of February last year to 15.41 Million Kgs. Within the West of Rift, output dropped by 18.60% from 35.87 Million Kgs to 29.20 Million Kgs.

Owing to the effects of dry weather conditions, the smallholder Sub-sector under the Management of KTDA, which has a wider coverage in the East of Rift recorded a production decline of 24.12% (7.57 Million Kgs) from 31.38 Million Kgs during the corresponding month of 2024 to 23.81 Million Kgs. The Estates sub-sector recorded a decline of 18.68% from 11.94 Million Kgs to 9.71 Million Kgs.

The drop in production within the state-owned Nyayo Tea Zones and the Private/Independent tea producers was relatively lower at 14.38% and 8.27%, respectively.

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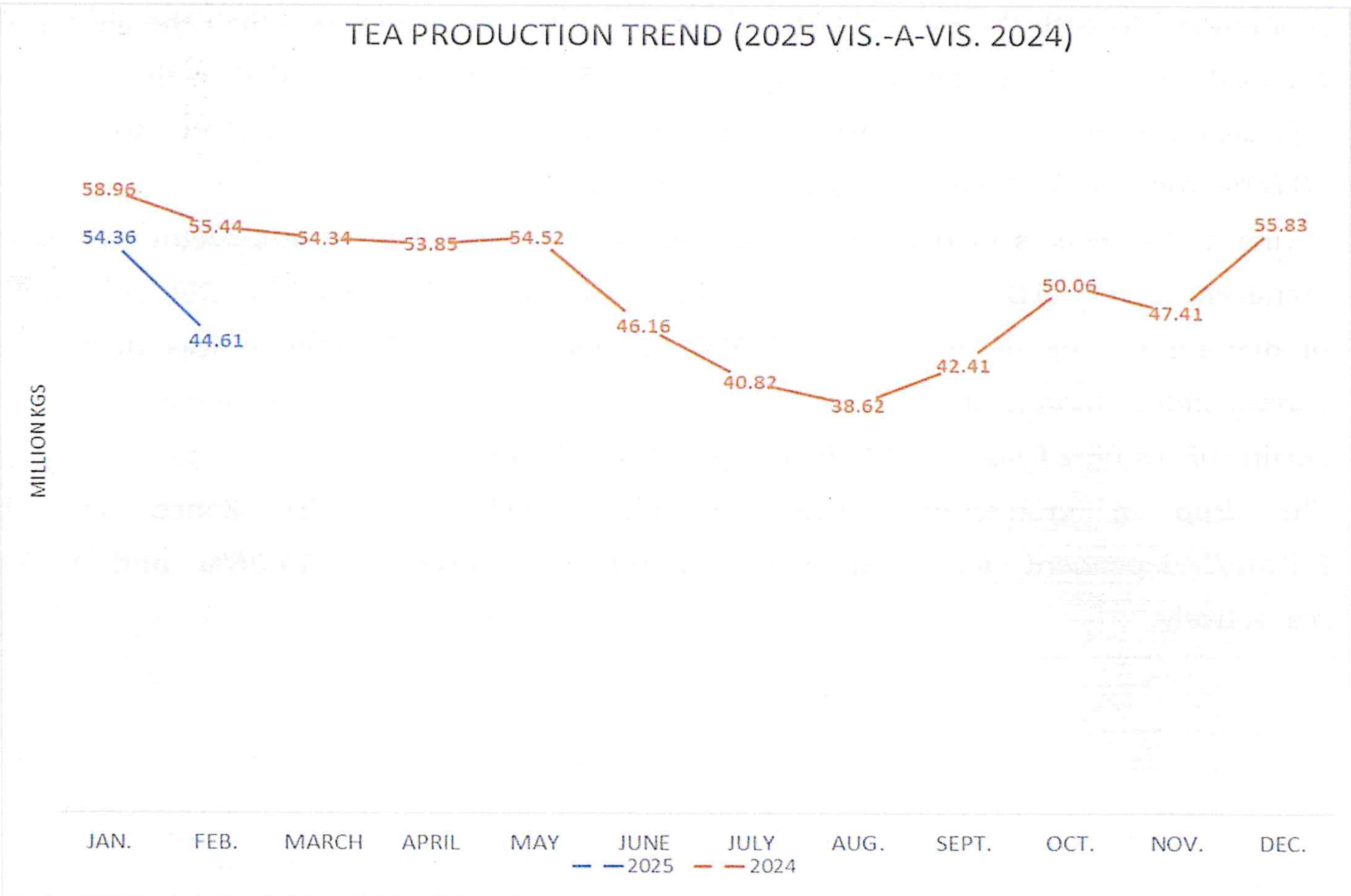
Table 1: Production by Sub-Sector and Region (2025 vis-à-vis 2024)

Sector/factory	Block	Feb-25	Feb-24	Variance +/-	Var.(%)	Jan-Feb 2025	Jan-Feb 2024	Variance +/-	Var. (%)
Estates	West of Rift	9,385,586	11,598,229	- 2,212,643	-19.08%	22,114,733	24,709,164	- 2,594,431	-10.50%
	East of Rift	330,773	349,640	- 18,867	-5.40%	780,984	786,210	- 5,226	-0.66%
	Total	**9,716,359**	**11,947,869**	**- 2,231,510**	**-18.68%**	**22,895,717**	**25,495,374**	**- 2,599,657**	**-10.20%**
Smallholders-KTDA	West of Rift	9,800,886	13,771,707	- 3,970,821	-28.83%	21,076,400	27,769,939	- 6,693,540	-24.10%
	East of Rift	14,015,451	17,615,780	- 3,600,329	-20.44%	30,137,506	35,502,637	- 5,365,131	-15.11%
	Total	**23,816,337**	**31,387,487**	**- 7,571,150**	**-24.12%**	**51,213,905**	**63,272,576**	**-12,058,671**	**-19.06%**
Independents	West of Rift	9,750,320	10,253,944	- 503,624	-4.91%	21,655,960	21,406,050	249,910	1.17%
	East of Rift	973,037	1,436,348	- 463,311	-32.26%	2,379,712	3,307,611	- 927,899	-28.05%
	Total	**10,723,357**	**11,690,291**	**- 966,935**	**-8.27%**	**24,035,672**	**24,713,660**	**- 677,988**	**-2.74%**
Nyayo T. Zones	West of Rift	265,318	252,638	12,680	5.02%	606,140	572,826	33,314	5.82%
	East of Rift	95,711	169,038	- 73,327	-43.38%	230,914	359,776	- 128,862	-35.82%
	Total	**361,029**	**421,676**	**- 60,647**	**-14.38%**	**837,054**	**932,602**	**- 95,548**	**-10.25%**
Estates, Smallholder, Independents & Nyayo Tea. Zones	West of Rift	29,202,110	35,876,518	- 6,674,408	-18.60%	65,453,233	74,457,979	- 9,004,746	-12.09%
	East of Rift	15,414,972	19,570,806	- 4,155,834	-21.23%	33,529,116	39,956,234	- 6,427,118	-16.09%
	Grand Total	**44,617,082**	**55,447,323**	**-10,830,241**	**-19.53%**	**98,982,349**	**114,414,212**	**-15,431,863**	**-13.49%**



During the month of February, speciality teas produced was 793,040 Kgs, which represented 2% of the total production. Speciality teas were dominated by Orthodox teas at 99% and was largely produced by Plantation and Independents tea factories. The rest of speciality teas consisted of Green and Purple tea types.

TEA SALES

AUCTION

During the month of February, auction sales volume for Kenya tea stood at 35.89 Million Kgs, which was lower compared to 39.11 Million kgs recorded during the corresponding month of last year but higher than that of January, which stood at 33.76 Million Kgs. The weighted average monthly auction price for Kenya tea was slightly higher at 2.25 USD per Kg against 2.23 USD in the same period of last year and 2.19 USD recorded in the month of January this year. In addition, absorption of teas on offer was higher at 81% compared to 53% for the same period of last year.

Notably, prices of tea followed the quality, with "Best" category of CTC "Leaf" and "Dust" grades (well sorted and those with brighter liquors and appearance) fetching higher prices compared to "medium" and "plainer" categories which attracted discounted prices or no bid by the buyers and consequently constituted the highest proportion of teas on offer at the auction that were withdrawn. Similarly, secondary grades and reprint offers for particular garden marks also fetched lower prices.

During the month of February 2025, tea offered for sale by the smallholder tea factories whose quality is relatively higher compared to other producers, fetched a relatively higher weighted average price of 2.65 USD per Kg for the main grades. This was also higher compared to an average price of 2.51 USD realized in the same period of 2024 and 2.64 USD recorded in February 2023.

Though there was generally good demand for tea offered at the auction, prices continued to be impacted negatively by the effect of global economic shock experienced in most countries due to the Russia-Ukraine crisis. The situation has been exacerbated by increased quantities of carry-over stocks along the value chain occasioned by higher production in the last two years. Other emerging challenegs affecting auction sales include delay in shipments to Europe and North Africa owing to attack of vessels along the Red Sea route by Houthi rebels.

Table 2: Auction Sales (2025 vis-à-vis 2024)

	2025		2024		2023	
	Vol. M. Kgs	Value (USD/KG)	Vol. M. Kgs	Value (USD/KG)	Vol. M. Kgs	Value (USD/KG)
JAN.	33.76	2.26	42.48	2.19	32.70	2.33
FEB.	35.89	2.25	39.11	2.23	39.14	2.31
MARCH			42.35	2.15	35.42	2.39
APRIL			43.60	2.29	26.93	2.39
MAY			31.05	2.18	36.75	2.19
JUNE			28.47	2.14	52.94	2.09
JULY			34.14	2.21	26.77	2.06
AUGUST			25.11	2.20	61.16	2.25
SEPT.			22.60	2.25	42.97	2.25
OCT.			32.58	2.07	58.28	2.16
NOV.			31.08	2.22	48.69	2.17
DEC.			23.72	2.19	26.95	2.19
TOTAL/AVG.			**396.29**	**2.19**	**488.7**	**2.23**

EXPORTS

The total export volume for the month of February 2025 was slightly lower by 11.45 Million Kgs from 53.80 Million Kgs recorded in the same period of last year to 42.34 Million Kgs. It was also lower compared to 47.21 Million Kgs exported during the month of January this year.

During the month of February, Kenya tea was shipped to fifty-eight (58) export destinations compared to fifty-three (53) for the same period of last year. Pakistan maintained the leading export destination for Kenyan tea having imported 14.77 Million Kgs, accounting for 34.9% of the total export volume.

Other key export destinations for Kenya tea were Egypt (5.80 Million Kgs, 13.75%); UK (3.92 Million Kgs,9.3%); Sudan (2.17 Million Kgs, 5.1%); Russia (1.98 Million Kgs, 4.7%); India (1.34 Million Kgs, 3.2%); UAE (1.31 Million Kgs, 3.1%); Iran (1.03 Million Kgs, 2.4%); Saudi Arabia (1.02 Million Kgs, 2.4%); and Oman (1 Million Kgs, 2.4%);

The top ten export destinations, majority of which are traditional markets for Kenya tea accounted for 81.2% of Kenya tea export volume. Amongst the ten key markets, Sudan, India and Oman recorded increased imports for Kenya tea. There was also significant increase in exports to Kazakhstan and Sri lanka and to emergiing and seasonal markets such as Jordan; Bangladesh; Iraq; Uzbekistan; Kyrgyzstan; New Zealand; Georgia; Israel; Austria; Spain; Brazil; and Italy.

During the month of February, value added tea exports was 1.45 Million Kgs, which represented 3% of the total export the volume. The exports in value-added form were shipped to twenty-eight (28) market destinations which included United Kingdom; Somalia; Yemen; Sudan; Ireland; USA; Burkina Faso; Cote D'ivoire; Mali; South Sudan; France; India; Angola; Japan; Malaysia; Niger; Ghana; Italy; Brazil; UAE; Hong Kong; Saudi Arabia; Swaziland (Eswatini); South Africa; Canada; Vietnam; Czech Republic and Pakistan. Out of the total value-added tea exports, United Kingdom accounted for the highest volume at 31%.

LOCAL TEA SALES

Local tea sales for February was lower at 2.64 Million Kgs against 2.83 Million Kgs for the same period of 2024 and 2.92 Million Kgs recorded during the corresponding month of February 2023. Cumulative tea sales for the two months period up to February 2025 was also lower at 5.52 Million Kgs against 6.13 Million Kgs for the corresponding period of 2024 and 5.94 Million Kgs for the same period of 2023.

Table 3: Local Sales Trend

	2025 (Million KGS)	2024 ()Million KGS	2023 (Million KGS)
January	2.88	3.30	3.02
February	2.64	2.83	2.92
March		2.94	2.97
April		3.22	2.56
May		3.32	3.08
June		2.86	2.85
July		2.74	3.09
August		3.28	3.71
September		2.74	2.99
October		3.34	3.34
November		3.26	3.31
December		3.77	3.46
TOTAL		**37.6**	**37.3**

Table 4: Kenya Tea Exports by Destination (February 2025 vis-à-vis February 2024)

DESTINATION	2025- QUANTITY KGS	2024- QUANTITY KGS	QUANTITY VARIANCE KGS	%AGE VARIANCE
PAKISTAN	14,778,352	16,439,428	-1,661,076	-10%
EGYPT	5,801,588	9,785,929	-3,984,341	-41%
UK	3,921,090	6,599,849	-2,678,759	-41%
SUDAN	2,173,227	750,406	1,422,821	190%
RUSSIA	1,984,610	2,103,175	-118,565	-6%
INDIA	1,340,189	718,014	622,175	87%
UAE	1,311,620	3,503,082	-2,191,462	-63%
IRAN	1,034,498	1,261,079	-226,581	-18%
SAUDI ARABIA	1,028,818	2,144,538	-1,115,720	-52%
OMAN	1,005,495	328,638	676,857	206%
POLAND	831,091	1,077,751	-246,660	-23%
KAZAKHSTAN	770,299	438,784	331,515	76%
JORDAN	649,750		649,750	
SOMALIA	609,642	614,040	-4,398	-1%
SWITZERLAND	575,544	504,476	71,068	14%
CHINA	522,479	1,010,606	-488,127	-48%
IRELAND	484,330	642,537	-158,207	-25%
SRI LANKA	470,049	111,231	358,818	323%
CHAD	469,180	993,041	-523,861	-53%
AFGHANISTAN	298,274	321,270	-22,996	-7%
YEMEN	281,180	1,121,064	-839,884	-75%
MALAYSIA	266,789	245,694	21,095	9%
UKRAINE	166,503	355,182	-188,679	-53%
GERMANY	153,510	126,033	27,477	22%
NETHERLANDS	148,500	279,880	-131,380	-47%
QATAR	119,948	66,194	53,754	81%
USA	117,970	219,924	-101,954	-46%
SOUTH AFRICA	110,352	167,274	-56,922	-34%
AUSTRALIA	91,360	24,000	67,360	281%
JAPAN	90,460	270,242	-179,782	-67%
TURKEY	82,828	133,973	-51,145	-38%
BANGLADESH	68,280		68,280	
IRAQ	61,321		61,321	
UZBEKISTAN	56,330		56,330	
CANADA	51,320	133,312	-81,992	-62%
TAIWAN	46,100	48,000	-1,900	-4%
KYRGYZSTAN	40,304		40,304	
MAURITIUS	40,000	26,000	14,000	54%
BURKINA FASO	38,814	41,398	-2,584	-6%
HONG KONG	34,430	12,364	22,066	178%
NEW ZEALAND	27,440		27,440	
GEORGIA	27,000		27,000	
MALI	26,473	20,026	6,447	32%
ISRAEL	24,207		24,207	
AUSTRIA	23,120		23,120	
VIET NAM	13,320	48,000	-34,680	-72%
GHANA	12,763	25,600	-12,837	-50%

SPAIN	11,072		11,072	
SOUTH SUDAN	10,968	127,618	-116,650	-91%
COTE D'IVOIRE	7,764	43,982	-36,218	-82%
ANGOLA	6,360	25,380	-19,020	-75%
BRAZIL	6,331		6,331	
ITALY	5,600		5,600	
GUINEA	5,174	10,348	-5,174	-50%
NIGER	5,174	15,522	-10,348	-67%
MYANMAR	5,108	2,028	3,080	152%
SWAZILAND	778		778	
SINGAPORE	250	15,232	-14,982	-98%
AZERBAIJAN		18,360	-18,360	-100%
BAHRAIN		7,200	-7,200	-100%
CENTRAL AFRICAN REPUBLIC		24,218	-24,218	-100%
CZECH REPUBLIC		200	-200	-100%
DJIBOUTI		76,800	-76,800	-100%
ETHIOPIA		92,608	-92,608	-100%
GEORGIA		28,550	-28,550	-100%
NIGERIA		600,458	-600,458	-100%
TOTAL	42,345,326	53,800,538	-11,455,212	-21%

22nd April 2025

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CHIEF EXECUTIVE OFFICER
TEA BOARD OF KENYA